Information & Assistance Training

IOWA DEPARTMENT ON AGING

January 31, 2019

Optimization of Older Americans Act Services

Let's begin!

Goal: *Understand the I&A definition and how to implement it for statewide consistency.*

Person Centered
- Meeting consumer needs
- Supports & empowers client choice

Timely
- Identify the needs of the consumer
- Link to most appropriate service[s]
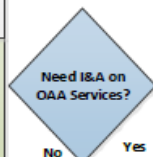
Accurate
- High data integrity
- Tell the story [legislatively, potential funders]

Aging & Disability Resource Center:
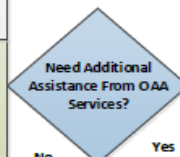## Community Navigation & Coordination System

January 2019

System Access

* 866-468-7887
* www.lifelonglinks.org
* Visits AAA
* Outreach Service

Consumers

1) Individuals Age 60 or Older
2) Individuals Age 18 or Older Living With a Disability
3) Family Caregivers
4) Veterans
Or Someone Calling on a Consumer's Behalf

Navigation of Supports & Services

Information & Assistance Service

- Caregiver Assistance (FCG)
- Caregiver Assistance (ORC)
- EAPA Consultation

Minimal Service Intervention
Short Duration
* Can self advocate or arrange for supports & services
* May need information and/or guidance on private and public programs and services

---

Need I&A on OAA Services? No / Yes

Coordination of Supports & Services

Options Counseling Service
(0 – 90 Days)

- Family Caregiver
- Older Relative Caregiver

Limited Service Intervention
Varied Duration
* Have a critical, point in time need
* Financial need but not eligible or don't need long- term public support
* ADL and/or IADL impairment
* Can address other needs on own
* May be able to contribute toward cost of service
* Would benefit from preventative service

Intensive Service Intervention
Long Term Duration
*Have financial needs
*ADL and/or IADL impairments
*Alone or minimal caregiver support
*Caregivers with high demands
*Other indicators; mental health issues, food insecurity

Need Additional Assistance From OAA Services? No / Yes

Older Americans Act Services

Adult Day / Health Services	**Homemaker Service**
Assisted Transportation Service	**Information Services** - Family Caregiver - Older Relative Caregiver
Behavioral Health Supports	
Case Management Service (90+ days) - Assistance: Caregiver Case Management - EAPA Assessment & Intervention	**Legal Assistance**
	Material Aid Service - Supplemental Services: Family Caregiver - Supplemental Services: Older Relative Caregiver
Chore Service	
*Congregate Nutrition - Family Caregiver - Older Relative Caregiver	***Nutrition Counseling Service**
	*Nutrition Education Service
Counseling – Family Caregiver	**Outreach Service**
Emergency Response System - Family Caregiver - Older Relative Caregiver	**Personal Care Service**
	Respite Care Service
*Health Promotion: Evidence-Based	**Support Groups - Caregivers**
*Health Promotion: Non Evidence-Based	**Training & Education** - Training Family Caregiver - Training Older Relative Caregiver
*Home Delivered Nutrition - Family Caregiver - Older Relative Caregiver	
	*Transportation Service

*These services may be accessed independently without going through the system. Intake forms are still required to be completed by providers and contractors and submitted to AAAs.

Connect to Other Resources Within ADRC Like:

Disability Resources	Housing	Palliative Care
Mental Health Assistance	Oral Health	Financial Management Counseling
Veteran Assistance	Food Assistance	Other Supports & Services

Key

Mandatory Core OAA Services

Optional OAA Services

Potential Other ADRC Services

Optimization of OAA Services

Sellers Dorsey – Consultants

Expanding the optimal core services and target populations for Iowa's AAAs/ADRCs to most effectively meeting the needs of individuals served and ensure consistent service provision statewide.

IDA

Provide required training on each OAA service.

Record and place on IDA website for future reference. i.e. new employees, refresher

Available for Technical Assistance.

Quarterly Conversations

IDA Director and applicable staff meet with AAA Director and applicable staff to review data, discuss Area Plan goals & progress, AAA highlights and address any concerns.

OAA Service & Funding Sources

Available AAA services have been organized in the following three broad categories:

> ➢ *Information & Service Assistance*
> ➢ *Nutrition & Health Promotion*
> ➢ *Services to Promote Independence*

The organization of these three broad categories supports efforts for reporting and budgeting.

OAA Services

OAA Service and Funding Sources
Draft - January 22, 2019

The grid below details by service, the allowable funding sources and whether the service is mandatory or options. In an effort to better organize offerings by AAAs, the available services have been organized in the following three broad categories:

- *Information & Service Assistance*
- *Nutrition & Health Promotion*
- *Services to Promote Independence*

The organization of these three broad categories supports efforts for reporting and budgeting.

Information & Service Assistance (Mandatory)	Nutrition & Health Promotion (Mandatory)	Services to Promote Independence (Optional)	

• Case Management
  FC Case Management
  ORC Case Management - Optional
  EAPA Assessment & Intervention
• FC Counseling
• Information & Assistance
  FC Information & Assistance
  ORC Information & Assistance- Optional
  EAPA Consultation
• Legal Assistance
• Options Counseling
  FC Options Counseling
  ORC Options Counseling - Optional
	• Congregate Nutrition
	  FC Congregate Nutrition –Optional
	  ORC Congregate Nutrition – Optional
	• Health Promotion:
	    Evidence-Based
	• Health Promotion:
	    Non Evidence-Based
	      (Optional)
	• Home Delivered Nutrition
	  FC Home Delivered Nutrition - Optional
	  ORC Home Delivered Nutrition- Optional
	• Nutrition Counseling
	• Nutrition Education
		• Adult Day Care / Health
		• Assisted Transportation
		• Behavioral Health Supports
		• Chore
		• Emergency Response System
		  FC Emergency Response System
		  ORC Emergency Response System
		• Homemaker
		• FC Information Services
		  ORC Information Services
			• Material Aid
			  FC Supplemental Services
			  ORC Supplemental Services
			• Outreach
			• Personal Care
			• FC Respite Care
			  ORC Respite Care
			• FC Support Groups
			  ORC Support Groups
			• Training & Education
			  FC Training
			  ORC Training
			• Transportation

Note: Older Relative Caregiver (ORC) services align with Family Caregiver (FC) services. Older Relative Caregiver services are all optional.

Information & Service Assistance

| MANDATORY SERVICES | Allowable IDA Funding Source (IAFRS Funding Line) | | | | | | | | | IAFRS Budget Code | Title 3B Priority service? | Registered service? | Direct Service Waiver Req'd? |
	Elderly Services (110)	LifeLong Links (116)	EAPA (123)	T3B (180)	T3C1 (190)	T3C2 (200)	T3D (220)	T3E (215)	NSIP (250)				
Case Management	X			X						06	Y	Y	N
FC Case Management	X							X		CG9	N/A	Y	N
ORC Case Management - Optional	X							X		GO9	N/A	Y	N
EAPA Assessment & Intervention	X		X*	X						C08	N	Y	N
FC Counseling	X							X		CG3	N/A	Y	Y
ORC Counseling - Optional	X							X		GO3	N/A	Y	Y
Information & Assistance	X	X		X						13	Y	Y	N
FC Information & Assistance	X	X						X		CG10	N/A	Y	N
ORC Information & Assistance Optional	X							X		GO10	N/A	Y	N
EAPA Consultation	X		X*	X						C07	N	Y	N
Legal Assistance	X			X						11	Y	N	Y
Options Counseling	X	X		X						E05	N	Y	N
FC Options Counseling	X	X						X		CG8	N/A	Y	N
ORC Options Counseling - Optional	X							X		GO8	N/A	Y	N

Governing Law and Statutory Authority

Older Americans Act of 1965

Iowa Code

- Title VI, Chapters 231 & 231E
- Iowa Administrative Code

State Plan on Aging

- AAA Area Plans

Reporting Manual

OLDER AMERICANS ACT OF 1965

[Public Law 89–73]

[As Amended Through P.L. 114–144, Enacted April 19, 2016]

The IOWA LEGISLATURE

AREA AGENCIES ON AGING (AAA) REPORTING MANUAL

EFFECTIVE DATE: JULY 1, 2018

VERSION: 19-V3

ISSUE DATE: FEBRUARY 16, 2018

VERSION REVISED DATE: OCTOBER 1, 2018

IOWA STATE PLAN ON AGING
Federal Fiscal Years 2018-2021

PROMOTE HEALTHY LIFESTYLE CHOICES

HELP OLDER IOWANS AGE IN PLACE

PREVENT ABUSE, NEGLECT & EXPLOITATION

PROTECT & PRESERVE RIGHTS

ida
IOWA DEPARTMENT ON AGING

Services, Definitions & Unit Measures

Information and Assistance – Mandatory
Subcategories:
    – **FC Information & Assistance**
    – **ORC Information & Assistance** - Optional
    – **EAPA Consultation**
	Unit Measure

A service that:
• provides the individual with current information on opportunities and services available within the communities, including information relating to assistive technology;
• assesses (identifies) the problems and capacities of the individual;
• links the individual to the opportunities and services that are available;
• to the maximum extent practicable, ensures that the individual receive the services needed and is aware of the opportunities available, by establishing adequate follow-up procedures; and
• serves the entire community of older individuals, particularly—
    o older individuals with greatest social need;
    o older individuals with greatest economic need; and
    o older individuals at risk for institutional placement. (Source: OAA)
Note: An individual is anyone age 60 or older, 18 or older living with a disability, caregiver, veteran or anyone calling on their behalf.
	1 Contact

IOWA DEPARTMENT ON AGING

FC Information & Assistance
ORC Information & Assistance - Optional

A service that:
- provides the caregiver with current information on opportunities and services available within the community, including information relating to assistive technology;
- assesses (identifies) the problems and capacities of the caregiver;
- links the caregiver to the opportunities and services that are available;
- to the maximum extent practicable, ensures that the caregiver receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures; and
- serves the entire community of older individuals, particularly—
  o caregivers who are older individuals with greatest social need;
  o older individuals with greatest economic need;
  o older relative caregivers of children with severe disabilities, or individuals with disabilities who have severe disabilities;

Family caregivers who provide care for individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and caregivers of "frail" individuals defined as: unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; and/or cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual. (Source: OAA)

EAPA Consultation

Provision of service to a consumer or non-consumer who is calling on their own behalf or on behalf of a consumer, who is either at risk of, or experiencing abuse, neglect or financial exploitation through one-on-one discussion(s) identifying what is important to the person and for the person with the consideration of dignity of risk that may occur in person, by phone, or electronically, and results in: (a) An understanding of the EAPA consumer's situations and capacities; (b) Linking the EAPA consumer/non consumer to available community resources and services; and (c) To the maximum extent practicable, follow-up to ensure that the EAPA consumer/non consumer received services and is aware of the available resource options. (Source: IDA)

Information & Assistance

What it is?

A professional service that is the first impression of your agency/Aging Network.

Supports & empowers client choice = Advocacy

Person-centered interview that Identifies and meets the needs of the consumer.

Links individuals to the most appropriate service[s] – at this point in time.

Follow-up, when appropriate.

What it is not?

Lists requested *not* on behalf of a consumer. ie. MCO requests a list of congregate meal sites in a county.

RSVPs to AAA events, ie. daily Congerate Meal reservations, trainings/seminars.

Everytime the telephone rings is *not* necessarily an I&A unit.

These activites could be logged as "Information Provided."

The *art*, *science* and *practice* of bringing people and services together.
-- Alliance of Information & Referral Systems [AIRS]

The I&A Process

Welcome & Rapport: building trust and rapport through active listening

Identify Needs: defining client needs; understand nature & extent of client's situation; probing questions; prioritizing for point-in-time

Clarification: ensure accurate understanding of client's situation

Information Giving: specific information to a direct request

Referral/Assistance Giving: info/referrals useful and relevant to client needs

Closure: summarize and restate what has occurred; verify client's understanding
-- Follow-up, if necessary

17,805 Consumers

I&A

2,427 Consumers

CG & GOAccess Assistance

24,164 Units

1.4 Units / Per Consumer

4,683 Units

2 Units / Per Consumer

$1,555,195

$64 / per unit
$87 / per consumer

$597,886

$128 / per unit
$246 / per consumer

ida
IOWA DEPARTMENT ON AGING

IDA PERFORMANCE PLAN

The table below shows the measures and targets in the Iowa Department on Aging's SFY2018 Performance Plan. IDA sets SFY targets for these measures based upon AAA annual area plan projections. The actual results are based upon AAA service reporting. Note that the measures in BOLD are also in the Governor's Budget Book.

Performance Measure	FY 2018 Target	FY 2018 Actual	Target Met?
Number of older Iowans receiving at least 1 OAA nutrition, supportive, or elder rights service	50,000	48,477	N
Number of Iowans receiving information & assistance or caregiver access assistance service	10,000	19,874	Y
Percentage of Lifelong Links Callers Indicating They Received the Information They Sought	85%	98%	Y
Number of Iowans receiving Options Counseling service	1,525	1,933	Y
Percentage of Options Counseling Consumers Indicating They Received information to Make Informed Decisions about	85%	97%	Y

Service Planning & Evaluation
SFY18

Purpose:
- Analysis
- Planning
- Service Delivery Strategies
- Reporting
- Targeting [OAA]
  - Greatest Economic
  - Greatest Social Need
  - At Risk for Institutional Placement
  - Frail

Aging & Disability Network Consumer Intake Fields
Age / DOB
Gender
Minority Status
Primary Language
Rural Status *as determined by zip code
Lives Alones
Income
Household Size
Poverty Status
Total IADL
Total ADL
Nutrition Risk Score
Medicaid Status
Food Insecure Q1
Food Insecure Q2

*At a minimum, record the name, zip code, and age or birthdate of the person receiving Information and Assistance or, and EAPA Consultation. As a best practice, collect additional consumer information, including but not limited to contact information, gender, race, ethnicity, and primary language, as needed to facilitate service delivery and *to obtain an unduplicated count* of Information and Assistance and EAPA Consultation consumers.

ida
IOWA DEPARTMENT ON AGING

Frequently Asked Questions

What activities occur during I&A?

Identifying consumer needs and linking to appropriate services at this time, explaining levels of assistance available through AAA programs and follow-up when appropriate and necessary. All I&A activities should support and empower client choice. Lists of agencies, facilities, etc. provided to others *on behalf of an individual*, are allowed.

Who do we collect information about -- caller or person being called about?

Those age 60+, 18-59 w/disabilities, veteran, caregiver, or anyone calling on their behalf. Demographic information is ***not*** required for professionals, such as social worker, MCO, home care agency and will ***not*** be counted against missing data for I&A.

Can I&A be done only on the telephone?

I&A can occur via telephone, walk-in, e-mail or home visit. There may be instances when AAA staff meet with a consumer believing the visit will lead to Options Counseling. After consultation with consumer and no assessment is completed (consumer changed their mind/declined or more information was provided), this should be coded as I&A.

Frequently Asked Questions

At what point does an I&A become Options Counseling or EAPA Consultation become EAPA Assessment & Intervention?
Both Options Counseling and EAPA Assessment & Intervention begin when a face-to-face visit occurs *and* the appropriate assessment is conducted.

When is a call Caregiver Assistance: I&A?
Caregiver Assistance is provided when the person calling is an "informal provider of in-home or community care." Through thoroughly identifying the caller's need and AAA staff have determined the caller provides established a caregiving activity, the call can be recorded as Caregiver Assistance.
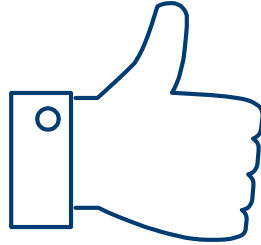
THANKS!

Any questions?

Contact Julie Bergeson

(515) 725-3332 or julie.bergeson@iowa.gov